

Appendix B

Send a Secure Document

For trade-related questions or time sensitive requests, please call 800-435-4000 for immediate assistance.

Account

Individual 7242-6548

Subject

Account Inquiry

Documents

Add up to 5 files, total limit of 25MB for all.

File types supported: pdf, docx, xlsx, gif, jpg, jpeg, tif, tiff, png, bmp.

Password Protected files are not supported.

Drag your files here, or browse your files

Message

Hello folks please repopulate my account message center with all my messages back to 9 December 2022 from when I was with TDA.

Thanks, Scott Traudt.

14 Sept 2024

163/1000

Is it safe for me to use this form to send confidential information? SchwabSafe

Yes, it is safe to send confidential information using this message tool. Messages sent using this tool are encrypted and are only accessible in the Message Center on Schwab.com after you log in. Please only send confidential information that is necessary to resolve your question. Remember that email is generally not a secure channel.

Chat with us

Cancel

Send

Message Center

Messages

Upload Document

Delete message

Date

Subject

Unread Urgent

09/14/2024

Scheduled

Messages

07/12/2024

RE: Account

07/11/2024

Account Inc

07/01/2024

Regarding

06/27/2024

RE: Account

06/27/2024

Account Inc

06/27/2024

RE: Account

06/27/2024

Account Inc

06/26/2024

Account

06/26/2024

Account

01/31/2024

Account inc

RE: Account Inquiry



Date: 09/15/2024 Account: Individual ...548 Category: Customer Service

From: Schwab Client Service

Message #: 06919NK6UYEN6KMS

Dear Mr. Traudt,

Thank you for taking the time to reach out to Charles Schwab! My name is Samantha and I would be happy to help you today.

I apologize, but this is not something we are able to do. Messages were one of the items that were not going to transition over with your account. We recommended saving any messages you might want before your account moved over, but we do not have a way to put them into your Schwab account.

If you have any further questions, please start a live chat on Schwab.com or reply to this secure message. Our representatives are available at any time to assist you. We greatly appreciate your business.

Sincerely,

Samantha Yenzer
eServices Representative
Client Service & Support
1-800-435-4000

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**Investment and Insurance Products: Not a Deposit • Not FDIC Insured • Not Insured By
Any Federal Government Agency • No Bank Guarantee • May Lose Value**

Guard against identity theft by avoiding email and Internet fraud: Be aware that Schwab will never request or disclose your personal information (account number, login password, Social Security Number) in either a non-secure or unsolicited email communication.

From: Scott Traudt
Sent: 9/14/2024 7:31:28 AM

Hello folks please repopulate my account message center with all my messages back to 9 December 2022 from when I was with TDA. Thanks, Scott Traudt. 14 Sept 2024

Close